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FinancialPlanning

# Wealthtech Weekly

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**By Rob Burgess**
Reporter

Last week, the Financial Times reported UBS has begun using OpenAI and Synthesia to create AI-generated scripts and avatars of its analysts. I spoke with advisors who have also begun experimenting with these tools. Clients find it interesting, said John Stoj of Verbatim Financial, but, "I'm not sure they want Max Headroom giving them financial advice."

Would you ever consider communicating with clients in this way? Let me know — robert.burgess@arizent.com.

I hope you'll check out the article, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

**Connect with Rob:**

TOP STORIES

TECHNOLOGY

## Will advisors add AI avatars to their communication toolkit?

UBS has unveiled AI video avatars of its analysts, aiming to increase video production and client engagement. Will financial advisors take the same route?

- **Guitars are cool, but how do they play as investments?**
  While vintage Fenders, Gibsons and Martins can be worth thousands or even millions, advisors caution that collecting guitars should be for the love first and foremost.
- **Advisors share go-to strategies for connecting with women clients**
  A McKinsey study highlights the growing financial power of investors who are women and underscores that financial advisors who ignore them risk

missing out on a $10 trillion opportunity.

- **Schwab lawsuit, Raymond James woes: Top news September 2024**
  September's roundup of pressing issues in the wealth management space include an elder scam lawsuit embroiling Charles Schwab, accusations against Raymond James for failures in customer complaint reporting and more.
- **Financial advisors favor Trump, doubt his 2024 election prospects**
  A survey conducted by Financial Planning found that while 54% of advisors prefer Donald Trump to sit in the White House in 2025, 61% say Kamala Harris is the frontrunner.

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**Michael Kitces joins ADVISE AI 2025 PLUS registration is OPEN!**

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